

Document Manager and SharePoint

These notes have been compiled to answer prospect and customer questions about the differences between Document Manager and SharePoint.

Core functions



Document Manager

- A pure-play, cradle-to-grave, centralized document management workflow solution
- Focuses on departmental and company-wide administrative efficiency
- Upgrades and support are included in the purchase/license
- Designed and deployed to accomplish specific business tasks
- Straightforward, relatively fast implementation



SharePoint

- A highly reputable bundled Microsoft document storage and sharing platform
- Limited extended business functionality built-in
- Potential to develop to achieve highly complex business functions at a significant cost and over an extended period of time
- Requires expert in-house or third-party maintenance
- A powerful developers' platform beyond its core purpose implicit in its name "Share"

Summary

Document Manager is a specialised product for document management workflows with a focus on administrative efficiency.

SharePoint is a versatile platform with document storage and sharing capabilities that can be extended to support complex business functions but requires significant development effort and maintenance expertise.

SharePoint considerations

SharePoint is a platform, not a product. The most successful SharePoint systems have a lot of custom development behind them. SharePoint has some characteristics that organisations should consider:

1. Complexity

SharePoint can be complex to set up and configure, especially for organisations with limited IT resources or expertise.

2. Customisation challenges

While SharePoint offers extensive customisation capabilities, implementing custom solutions often requires specialised skills in ASP.NET. Additionally, plug-in additions can break Customisations and lead to maintenance challenges.

3. User adoption

SharePoint's user interface and functionality can be overwhelming for some users, and extensive training may be required.

4. Document management limitations

While SharePoint is designed for document storage and sharing, some users find its document management features weak compared to dedicated document management solutions. Poor search functionality and permissions management are common complaints.

5. Version control issues

SharePoint's version control system may not meet the needs of all organizations, especially those with strict compliance requirements. No strict check-out/check-in functionality.

6. Maintenance overhead

SharePoint typically requires at least one dedicated in-house administrator to manage and maintain the platform. Updates and patches may need to be applied regularly.

7. Cost

While SharePoint is included in Microsoft 365 subscriptions, additional licensing may be required for extended functionality. Custom development and maintenance costs can contribute to the overall expense of a SharePoint deployment.

8. Integration challenges

Integrating SharePoint with other business systems or applications may require additional development effort and expertise.



Document Manager

Innate characteristics

- Document capture from multiple sources
- Batch (bulk) capture, capability for page separation
- Indexing and central document storage
- Workflow automation
- Customisable user dashboards, pinned searches and prompts
- Multiple document views, including thumbnails
- Built-in rules, embedded conventions and policies
- Search and retrieval by criteria, including metadata
- Check-in Check-out version control
- Document level control, permissions
- Time-stamped activity, robust audit trails for QA and compliance
- Retention and purge automation
- GDPR and industry regulatory compliance functions
(including: permissions, retention and redaction)
- Integrates with leading business platforms: SAP, Sage,
Microsoft 365/Office, HR systems, Google docs
- BI and Advanced reporting
- Works for individual departments and cross-departmentally
- Leverage DLX IP, dedicated dev/install/support teams, and
progressive roadmap

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